

Client Intake Questionnaire
Dependent/EIC Information & Childcare Expenses

Enter Names Of Children And Other Dependents:

Full Name	SS#	DOB	Relationship	Mos. in Home

Enter Names Of Any Non-Dependents, If Any, That Qualify You For The EIC:

Full Name	SS#	DOB	Relationship	Mos. in Home

Child Care Providers (generally for children under age 13):

Complete Name & Address (number, street, apt. no., city, state & zip)	EIN (or SS#)	Amount Paid	Emplr Paid (Y/N)?

Was an EIC credit denied or reduced by the IRS for other than a mathematical or clerical error in any tax year since 1996? Yes No *[If Yes, Discuss with Tax Preparer]*

*** See Attached Sheet or Reverse Side for Rules on the Earned Income Credit ***

Principal Eligibility Rules for the Earned Income Tax Credit

Rules for you and your spouse:

- You and your spouse must have a valid Social Security Number.
- Your filing status CANNOT be “Married Filing Separately”.
- You must be a U.S Citizen or Resident Alien all year.
- You cannot file Form 2555 (relating to a credit for foreign earned income)
- Your investment income (including interest, dividends and capital gains on investment property such as stock and bonds) must be \$2550 or less.
- You must have earned income (such as wages, tips, or net earnings from self-employment). Earned income does not include pensions, social security payments, rental income, state tax refunds, or investment income.

Rules for your qualifying child:

- Your child must meet the relationship, age and residency tests:

Relationship

Your child must be either your son, daughter, adopted child, stepchild, grandchild or eligible foster child. Your brother, sister, stepbrother, or stepsister (or the child or grandchild of your brother, sister stepbrother, or stepsister) may also be a qualifying child if you care for this individual as you would your own child. Your child does not have to be your dependent to be a qualifying child unless he or she is married. An eligible foster child is one that has been placed with you by an authorized placement agency.

Age

Your child must be:

- ** Under age 19 at the end of 2002; or
- ** A full-time student under age 24 at the end of 2002; or
- ** Permanently and totally disabled at any during 2002.

Residency

Your child must have lived with you in the United States for more than half of 2002. (Military personnel stationed outside the U.S. on extended active duty are considered to have lived in the U.S. during that duty period for purposes of the EIC. Note that a child who was born or died in 2002 is treated as having lived with you for all of 2002.

- Your qualifying child cannot be used by more than one person to claim the EIC. You can choose which person will claim the child if you can agree. If you cannot, tie-breaking rules are used.
- You cannot be a qualifying child of another person.

Rules if you do not have a Qualifying Child:

- You must be at least age 25 but under age 65.
- You cannot be the dependent of another person.
- You cannot be the qualifying child of another.
- You must have lived in the United States for more than half the year